Viewing Contacts & Appointments/Tasks in the CCTO Tool

COVID-19 Community Team Outreach

To view your contacts, always begin on the Contacts Tab.

Contacts Tab

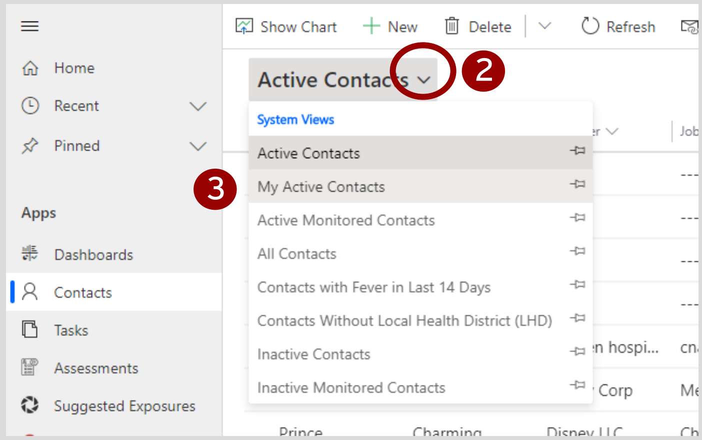
The Contacts Tab is your center of operations for reviewing and adding contacts.

1. Visit the Contacts tab.
2. Click the carrot next to "Active Contacts."
3. To see your contacts, click "My Active Contacts" by selecting from the dropdown list of views.

1 **Contacts Tab**

2 **Active Contacts**

3 **My Active Contacts**



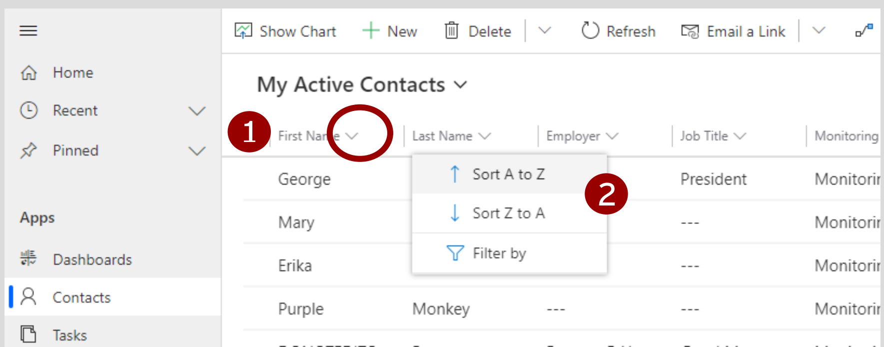
Sorting Contacts

You can choose to change the order of the contacts displayed by sorting.

1. Select the carrot next to any of the column headers (such as Last Name or Monitoring Status).
2. Choose a sort option.

1 **Column Headers**

2 **Sort Options**



Filtering LHD Contacts

To filter for all LHD contacts (or by another criteria):

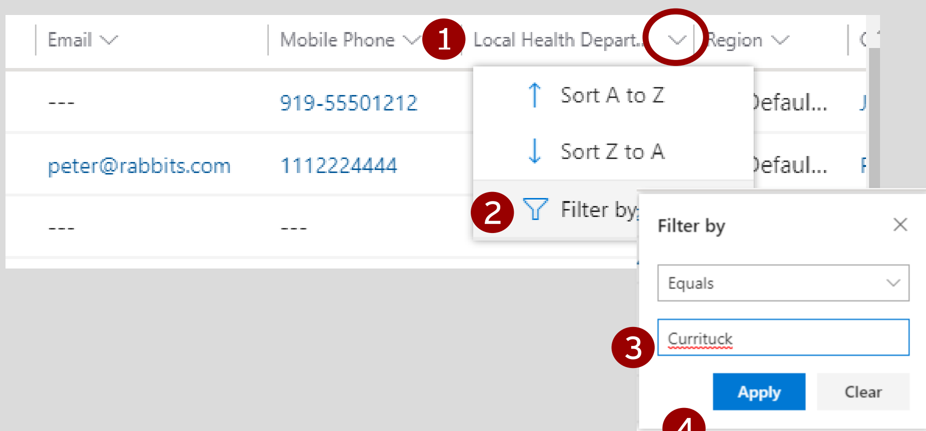
1. Select the carrot next to any of the column headers (such as Local Health Department)
2. Choose "Filter by."
3. Input your desired criteria.
4. Press "Apply."

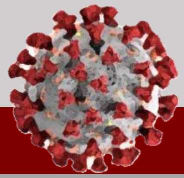
1 **Column Headers**

2 **"Filter by" button**

3 **Input Criteria**

4 **"Apply" button**





Viewing Contacts & Appointments/Tasks in the CCTO Tool

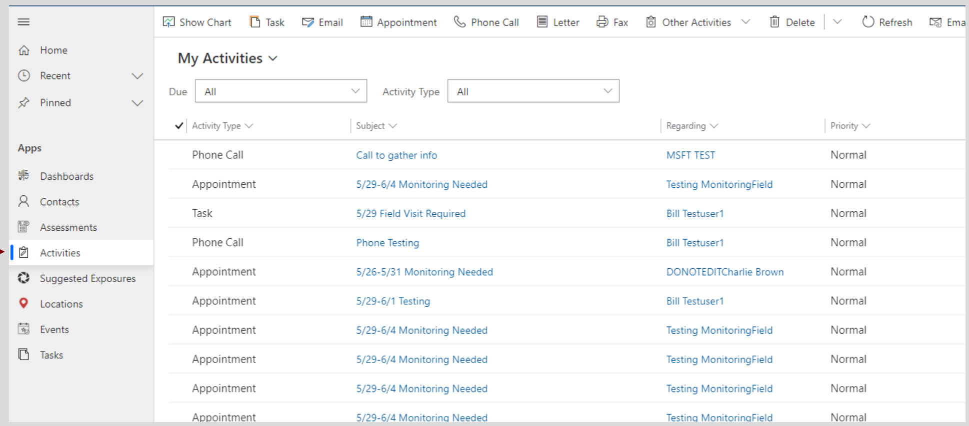
COVID-19 Community Team Outreach

For an overview of all the Timeline/Activities items you have already created, use the Activities Tab.

Viewing Appointments & Tasks in the Activities Tab

To review all appointments, tasks, and phone calls that have been created and assigned to you, visit the Activities Tab. This is done by clicking the Activities tab on the left-hand side of any screen.

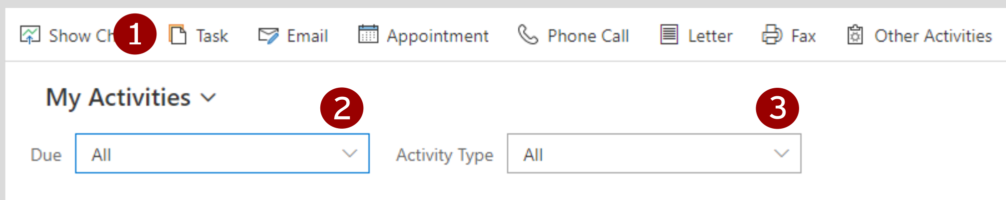
Activities Tab



This tab will default to showing you a list of **your** open items, and you can view each in detail by clicking on it. **Please note that this list will not account for any needed appointments, tasks, or phone calls that you have not yet created.**

Actions and Filters

1. You may choose to create new outreach items by selecting from the Task, Email, Appointment, or Phone Call buttons at the top of the screen.
2. You may also filter the list by due date by selecting from the "Due" dropdown, **AND**
3. You may narrow the kind of activity shown with the "Activity Type" dropdown.

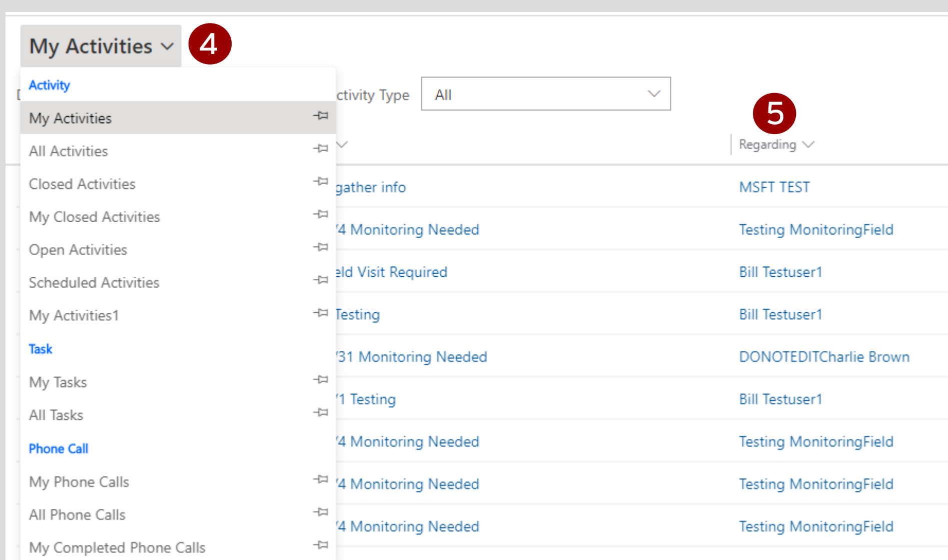


1 **Create Buttons**

2 **"Due" Dropdown**

3 **"Activity Type" Dropdown**

4. Similar to the Contacts tab, you can click "My Activities" to choose from a variety of views, including "My Closed Activities," which allows you to review what items you have completed.
5. You may also filter or sort (through the same process used on the Contacts Tab) by any of the column headers, including "Regarding," which shows the Contact tagged to an activity.



4 **My Activities**

5 **Column Headers**